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## **STATEMENT OF WORK**

### **OPPTS CONFERENCE & MEETING SUPPORT (NON-TECHNICAL)**

The Contractor shall furnish the necessary personnel, material, equipment, services and facilities (except as other specified), to perform the Statement of Work/Specifications included below. The Statement of Work under the contract shall be initiated by Work Assignments issued by the Contracting Officer.

### **BACKGROUND**

The Office of Prevention, Pesticides and Toxic Substances (OPPTS) has the lead for implementing pollution prevention programs within EPA. As such, we expect that all meetings/conferences will be staged using as many pollution prevention measures as possible. These meetings/conferences shall be showpieces for “green conferencing,” and the Contractor is expected to take the initiative in identifying practices as feasible. These include but are not limited to, waste management, recycling, energy use, use of renewable resources in a sustainable manner and conservation of non-renewable resources.

OPPTS is responsible for the implementation of several environmental laws, including the Toxic Substances Control Act (TSCA); the Federal Insecticide, Fungicide and Rodenticide Act (FIFRA); several provisions of the Federal Food, Drug and Cosmetic Act (FFDCA); the Pollution Prevention Act (PPA); Section 313 of the Emergency Planning and Community Right-to-Know Act (EPCRA); and the Residential Lead-Based Paint Hazard Reduction Act.

The Office consists of two major program areas – the Office of Pollution Prevention and Toxics (OPPT) and the Office of Pesticide Programs (OPP). OPPT manages programs on new and existing chemicals in the marketplace, asbestos, lead, PCB’s, pollution prevention, Design for the Environment and Green Chemistry Programs, and the Chemical Right-to-Know Initiative, including the High Production Volume (HPV) Challenge Program and, the Voluntary Children’s Chemical Evaluation Program (VCCEP).

OPP regulates all pesticides marketed in the U.S., ensuring that they do not pose any unreasonable risks to human health or the environment, and includes agricultural and household insecticides, herbicides and fungicides; microbes to kill pests; swimming pool disinfectants; germ-killing household cleaning products; anti-fouling boat paints; and many other pesticidal ingredients.

In addition, OPP is responsible for implementing the 1995 Food Quality Protection Act – a sweeping new food safety law which provides a health-based standard for pesticide residues in food. The Office of Science Coordination and Policy manages

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cross-program technical and science policy issues and administers the activities of the new FIFRA Science Review Board and the merged FIFRA Science Advisory Panel/Biotechnology Science Advisory Committee.

## **OBJECTIVE**

The purpose of this contract is to provide non-technical support services for meetings and conferences for OPPTS program offices by arranging all transportation needs for attending meeting participants; selecting hotel accommodations (including price, performance and environmental considerations, i.e. “green conferencing” in the selection of a particular hotel) and selection of a meeting facility.

These selections shall include price, performance environmental consideration associated with selection of a particular facility; provision of food and beverages, in general within all venues utilized for the conference.

The Contractor shall provide procedures for communicating with meeting participants as well as other general practices, registration, and dissemination of meeting related information to participants before, during, and after the meetings/conferences.

## **SCOPE OF WORK**

The Contractor shall arrange for meeting facilities and required equipment; making non-Federal Government expert travel arrangements, support the preparation and presentation of reports, including duplication (IAW, Clause H) and distribution of documents; and provide editorial support, audiovisual support, audio taping and transcription of tapes; prepare summary reports; and if needed, provide a meeting facilitator.

PLEASE NOTE: EPA will consider Contractor recommendations and will make all final decisions under this contract regarding environmental preferability.

## **OUTLINE OF WORK**

The work performed by the Contractor shall include all activities necessary for the conduct of a successful meeting or conference. These activities are outlined in the tasks and may be expanded upon in the subsequently issued work assignments. Some of the tasks may require a quick response of five business days or less. In performing these tasks, the Contractor is encouraged to identify and maximize the environmentally responsible features or practices available for conference or meeting activities, particularly if the outcome yields the same or more utility and reduces overall costs. The Contractor shall notify the EPA Project Officer (PO) & Work Assignment Manager

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(WAM) in advance in order to provide the PO & WAM with the opportunity to approve or disapprove the proposed environmentally preferred approach..

**THE CONTRACTOR SHALL PERFORM THE FOLLOWING MAJOR TASKS FOR A SUCCESSFUL MEETING/CONFERENCE:**

The Contractor shall organize (arrange and reserve space and the necessary equipment, i.e., audiovisual, telephone, microphone, podia, etc.), prepare, conduct, and/or document the proceedings for approximately 100 local and approximately 5 national/international panels, workgroups, symposia, or conferences a year. Some meetings will be of a technical nature and will require a level of expertise on the part of Contractor personnel not normally associated with a strictly meeting support contract.

- A. The Contractor shall in performance of the Statement of Work comply with the Green Conference Initiative (GCI) goals set forth in the Contractor's approved GCI plan. The Contractor shall have within its proposed staff or through a subcontractor arrangement, an individual or individuals designated to promoting "green conference" initiative goals. The contractor shall use the attached survey to help find conference sites.

**Measures & Standards:**

IAW: Attachment 1: EPA Green Policy

- B. The Contractor shall supply the necessary labor & materials required to complete work plans/budget, monthly progress reports and invoicing, and any other types of necessary reporting.

**Measures:**

Correct skill mix in order to complete work

—applicable mix for level of work/effort

Accuracy of math for invoicing & budget

Accuracy of information contained in the monthly progress report based upon the Monthly Progress Report clause.

Accuracy of following Invoicing procedures of the attachment Preparation of Invoices, and the Submission of Invoices clause.

Timeliness & Accuracy of Monthly Progress Report & Invoice submitted simultaneously.

Timely submission of Misc. reports (i.e. final reports for WA's) IAW the WA specifications.

Timely submission of Work plans

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Accuracy of content contained in the WP, addressing the specifics within the WA Statement of Work.

**Standards:**

Final report drafts are due no later than ten (10) working days after the initial request is made by the WAM.

Final reports shall be due no later than five (5) working days after receipt of EPA's final comments on the final draft.

- C. The contractor shall provide the work plan budgets in either Excel or Lotus 1-2-3; shall provide work plans in either Word or Wordperfect formats. Work plans and work plan budgets shall be submitted both in hard copy and electronically.

**Measures & Standards:**

Accurate & Correct formats are used and are submitted in both hard copy & electronically

- D. The Contractor shall design, obtain necessary approvals from the PO and WAM, produce, copy (within limits prescribed in the contract), and distribute notices including agendas, background materials, etc. The mailing list for distribution shall be furnished by the Project Officer or Work Assignment Manager unless the list is one which was already generated by the Contractor under a previous Work Assignment.

**Measures & Standards:**

Proper skill mix proposed for work level

Timeliness of gaining necessary approvals in order to distribute the mailings

Accurately meeting the amount of mailings w/o excess per verbal technical direction from the PO/WAM.

Timeliness of mailing per PO/WAM instructions within the WA.

- E. The Contractor shall provide logistical support in making and reimbursing expert subcontractor travel arrangements, making hotel arrangements, and providing per diem for experts.

**Measures:**

Proper skill mix for proposed work level

Timeliness of arrangements so that attendees can travel and be reimbursed hassle-free:

—airline reservations

—hotel reservations

—voucher reimbursement

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**Standard:**

Timeliness for reimbursement: 10 days after completion of trip, providing traveler information is received timely by the contractor.

- F. The Contractor shall provide conference/meetings space (if such space is not available from the General Services Administration (GSA) and ancillary materials (chairs, tables, podia, A/V equipment, computers, etc.). The Work Assignment will specify the requirements for seating arrangements (e.g., theater vs. classroom) and other physical layout requirements, including any needed telephone lines. (See the provision in Section H entitled “EPA Sponsored Meetings, Workshops and Conferences”) Contractor shall prepare a GCI plan to document the Contractor’s GCI goals for each meeting. A summary report on each conference or meeting shall be submitted to the Project Officer and the Work Assignment Manager.

**Measures:**

Accurately ensures that GSA has been checked for available space

Accurately securing adequate meeting/conference room(s) for group size, location, & physical lay-out (including electrical/internet/telephone capabilities).

Upon inspection by the WAM prior to the meeting, ensuring that the physical layout of the room(s) are as stated in the WA.

Accurately securing the necessary equipment in order to complete the WA

The contractor’s GCI plan accurately meets the requirements of the EPA’s current GCI directive.

The contractor’s GCI plan & summary report shall be submitted timely

**Standards:**

The GCI plan’s standard is the EPA’s GCI directive

Timeliness for the GCI plan submission is required with the work plan submission

Timeliness for the summary report is in accordance with the WAM’s specifications contained in each WA.

- G. The Contractor shall register attendees and participants and, when required by the Work Assignment, collect and account for registration fees. (See the provision on Section H entitled “EPA Sponsored Meetings, Workshops and Conferences.”)  
The method of payment shall only be by credit card.

**Measures:**

Accuracy in collecting the proper amount of fees.

Timeliness of attendees & participants registration (i.e. providing registrant’s information is received timely by the contractor.)

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Accuracy of method of payment

**Standard:**

Timeliness of registration is in accordance with the WAM's specifications contained in each WA.

- H. The Contractor shall provide the services of facilitators, where required. In addition, the Contractor shall provide expert advice, when directed by the Work Assignments, on the effectiveness of the Office of Pollution Prevention and Toxics (OPPT's) and the Office of Pesticides Programs (OPP's) public outreach materials or efforts. This may include, but not be limited to, convening focus groups or providing expert consultants in the area of public relations/outreach programs. (The Contractor will not be involved in evaluating the effectiveness of its own work). The Contractor shall have either the expertise available within its proposal staff or through a subcontractor arrangement to identify experts, including experts from interest groups, to actively participate in the meetings.

**Measures & Standards:**

Obtaining Facilitator's expertise and background in accordance with the necessary requirements of the WA Statement of Work.

Facilitator shall allow the WAM to review materials for presentation prior to the meeting  
Facilitator shall discuss with the WAM, the attendees' backgrounds gathered for the required groups.

Experts hired either through the prime contractor or subcontractor and available background information listing expertise

- I. The Contractor shall document proceedings by taking notes, taping meetings and transcribing, and/or providing court reporter services and prepare draft and final conference summaries, reports on position papers, draft and docket ready transcriptions, etc. The Contractor shall incorporate the Work Assignment Manager's comments into the final products. EPA will critically review and approve these documents before they are made final.

**Measures:**

Accuracy & content on notes, taping, and transcribing

They provide court reporter services when specified in the WA Statement of Work

Timeliness on any necessary reports as specified in the WA Statement of Work

Accuracy of report content

**Standards:**

The content on which the contractor will take notes, as specified by the WAM either in the WA or via technical direction.

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Timeliness of reports is as specified in the deliverables of the WA Statement of Work

- J. The Contractor shall translate already existing or newly developed non-technical to moderately technical written materials into other languages, primarily Spanish, but not exclusively. The types of documents for translation may include training materials, handbooks, transcripts of meetings, etc.

**Measures & Standards:**

When required, the contractor shall provide a resume of personnel for the requirement of written translation of foreign languages, primarily Spanish.

- K. The Contractor shall distribute documents prescribed in EPA communication strategies. The strategies shall be furnished by the EPA. The Contractor shall generate mailing labels, reproduce documents as required, and, within limits prescribed in the work assignment, assemble and stuff documents into envelopes, and deliver to EPA Mail Room, 1200 Pennsylvania Avenue, NW, Ariel Rios Building, Washington, DC 20460, (or such other sites may be described in the future) for mailing. The Contractor shall complete mailing required in the strategies within one to five business days depending on the size and complexity of the strategy.

**Measures:**

Accuracy of spelling on labels

Accuracy of document assembly

Accuracy of number of copies

Accuracy of the correct documents being placed in their corresponding envelopes

Timeliness of mailings

Timeliness of Stuffed Envelopes being brought to the EPA mail room

**Standards:**

Document assembly & reproduction ensures that pages are in order; the correct amount of pages are in each document

Timely mailing is between 1-5 business days (depending on size & complexity)

- L. The Contractor shall prepare publications and informational materials describing materials about specific products, pesticide use/handling information, and/or pollution prevention and toxics related materials. Informational materials may include, but are not limited to: brochures, booklets, pamphlets, fact sheets, posters, and newsletters. EPA will critically review and approve these documents before distribution to the public.

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**Measures:**

Timely preparation of any necessary materials as stated in the WA Statement of Work  
Accuracy of preparation of specific materials/documents  
Compile specifically related materials/documents as specified in the WA Statement of Work

**Standards:**

Prepare brochures, booklets, pamphlets, fact sheets, posters, and newsletters in accordance with provided EPA sample

- M. Contractor personnel shall introduce themselves as representing their own Firm under contract to EPA and shall prominently display badges identifying themselves as Contractor employees.

**Measures & Standards:**

Complete and accurate disclosure of contractor status

- N. *Access to Confidential Business Information (CBI).* The Contractor & all personnel relating to this contract shall have access to CBI submitted to EPA under any authority. The Project Officer shall obtain from the Contractor a Certification documenting that all necessary procedures under 40 CFR, Part 2, Subpart B (and any other applicable procedures), have been followed.

**Measures:**

The contractor shall be EPA CBI cleared (have a CBI clearance)

**Standards:**

The contractor shall gain an EPA CBI clearance within 30 days after award of the contract.

**QUALITY CONTROL OF Contractor DELIVERABLES**

The Contractor shall review all deliverables to ensure they meet all applicable standards defined for each task and subtask.

**CONTRACTORS COMMUNICATION WITH AGENCY STAFF**

In accordance with section H clause, Technical Direction EPAAR 1552.237-71  
Deviation, all technical direction shall be provided by or through the EPA Project Officer.



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In addition, all requests from EPA personnel to the Contractor shall be made through the EPA Project Officer or the alternate(s).

**SUMMARY OF DELIVERABLES:**

- The Contractor shall submit a work plan to the WAM within fifteen (15) working days of receipt of the Work Assignment from the Contracting Officer. The work plan shall contain a description of how the tasks will be accomplished, estimates of labor hours and other direct costs, estimated costs to be incurred for labor hours and other direct costs, and an estimated schedule for completion of each task.
- The Contractor shall submit drafts and finals of all written materials prepared for the tasks.
- Final drafts of products shall be due no later than ten (10) working days after the initial request is made by the WAM.
- Final products shall be due no later than five (5) working days after receipt of EPA's final comments on the final draft.
- The Contractor shall prepare travel authorizations and arrange for meeting facilities for meeting participants and prepare travel reimbursement vouchers for participants for each member to be delivered to the WAM for review.
- The Contractor shall provide draft and final meeting minutes to WAM when directed to take notes.
- Monthly Progress Reports shall be submitted according to the schedule required in the contract.

**PERFORMANCE MEASURES**

**A. Standards for a Successful Meeting or Conference:**

Pursuant to the specific requirements delineated in each work assignment, the Contractor shall deliver all necessary services and supplies to execute a successful conference meeting. Activities that define a successful conference or meeting are outlined in the contract statement of work and may be highlighted or supplemented through the work assignment statement of work.

**1. Surveys**

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At the conclusion of each conference or meeting, EPA will conduct a limited survey of conference or meeting participants (minimum of 4, not to exceed 6 individuals) soliciting input on their experiences with all aspects of the event. The chosen participants will not be in any way associated with the WA or the contractor. The survey will be conducted by the WAM and evaluated by the Project Officer. A copy of the survey is included as Attachment 2 of the contract and addresses the following performance areas: (1) rating periods will be once a quarter and will only review the performance of completed meetings or conferences in that quarter, and (2) the completion of an event will be acknowledged through the delivery and acceptance of all required deliverables for that event.

## **2. Rating Procedures for surveys**

**The rating factors will be 1-5 with 5 being the highest.**

**5 - Outstanding**

**4 - Excellent**

**3 - Acceptable**

**2 - Unsatisfactory**

**1 - Poor**

### **Survey of requirements for a successful meeting or conference:**

1. For accuracy, the Contractor shall provide accurate information (i.e. hotel/facility information; registration information; payment information & ease of reimbursement; timeliness or receipt of information; conference handouts).
2. For professionalism, the Contractor shall be polite and courteous. In addition, employees shall identify & represent themselves correctly (i.e. wearing name-badges, correctly identifying their own firm, if asked).
3. For timeliness, the Contractor shall complete all travel arrangements, and arrange for hotel facilities, conference rooms & meeting rooms (breakout rooms, etc), audiovisual equipment rental, telephone services (i.e., microphones, copier & copying services, light refreshments, video projection, flipcharts, microphones (i.e., tabletop microphone, cordless roving microphone, podium microphone, etc.), computer equipment (i.e., desktop, laptop, etc.) loaded with Windows XP Office, Powerpoint, and WordPerfect and a color printer with CD/RW capability, postage and express mail capability, and long distance telephone/fax. All of the above is set-up and ready for use at the start of the conference/meeting (if required).

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<u>Measures/Standards</u>	<u>Percentage:</u>	<u>Payment Application:</u>	<u>Applicable Tasks</u>
GCI Plan	100%	0% Deduction	A
	99-95%	2% Deduction	
	94-90%	3% Deduction	
	< than 90%	5% Deduction	
Timeliness	100%	0% Deduction	B-N
	99-95%	2% Deduction	
	94-90%	3% Deduction	
	< than 90%	5% Deduction	
Accuracy	100-98%	0% Deduction	B-N
	97-95%	2% Deduction	
	94-90%	3% Deduction	
	< than 90%	5% Deduction	
Personnel (In-House/ Subcontracted)	100%	0% Deduction	H, J & M
	99-95%	2% Deduction	
	94-90%	3% Deduction	
	< than 90%	5% Deduction	
Surveys	5	0% Deduction	Surveys
	4	2% Deduction	
	3	3% Deduction	
	< than 3	5% Deduction	